6sense Sales Intelligence Team & Growth
Admin Checklist - Trial

Data Settings

1 Keywords*

Add keywords that represent content research being done around your brand, competitors, customer pain points, and more. Sellers will be able to gauge the account's interests.

- 6sense will capture research being done at the account level along with location data
- Recommend a minimum of 10-20 generic and 5-10 branded keywords

2 Job Titles

Enter job titles that are relevant to your sales team to help them see whether an organization is growing.

- 6sense will detect job postings for accounts and how long ago the jobs were posted

3 Psychographic Data

Select terms or phrases companies mention across their digital footprint. Did they mention industry-related topics that are relevant to your products or services?

- 6sense will monitor an account's digital footprint for any terms or phrases you identify

4 Technographic Data

Add relevant technologies such as competitors and integration partners to arm sellers with information on accounts that may be a tech fit or for competitive takeout scenarios

- 6sense will track when an account is using any technologies you specify
- *Set up is optional*

***Recommendation**: set up the web tag in order to capture web activity for accounts visiting your website*

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Keywords represent content research from a network of B2B websites

Branded:
your products/brand and your competitors

Generic:
broader, topical industry related terms, and buyer's pain points

Keywords are NOT Google Search terms!

Re-order Data

- Arrange technologies, job titles, and psychographs to show in a specific order for sellers

Data Updates & Refresh

- Data settings take 24-48 hours to update in 6sense SI
- Keywords* and web activity are refreshed nightly

*Requires Growth subscription

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Sales Intelligence Settings

1 Persona Map

Customize to show key job levels and functions to help sellers uncover gaps

- 6sense will categorize CRM contacts/leads and new contacts into the appropriate job level and function

Set up when you become a 6sense SI customer:

2 Privacy Data Control

Set rules to restrict people profile data that pertain to privacy policy laws

- 6sense will not show sellers any people profiles from regions you specify

3 SI Actions

Control actions your sellers can take such as exporting, LinkedIn, Sales Navigator options and more

4 Components & Metrics

Enable or disable certain tabs, opportunity information and more to display only relevant insights to sellers

5 Activities

Customize which engagement and reach activities to display to sellers such as web activity, form fills, sales calls, marketing campaigns and more

6 Alerts

Set parameters around the types of intel sellers can receive via alerts which include specific URLs or intent activities*

Note: 6sense SI integrates with the following CRMs: SFDC, HubSpot CRM, and MS Dynamics.

Invite Sellers

- Once setup is complete, invite your sellers
- Assign credits

Authentication

- Users will receive an email to set up their password
- If your org has SSO enabled*, users will be automatically provisioned when they log in for the first time
- *Roles will be assigned by default for the SI App and ABM Platform (if applicable). Review and adjust as needed*

Learn More

Knowledge Base Articles:

- SI Settings
- Data Settings

Learning Materials Admins & Sales Teams:

- Trial Quick Start Page

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